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The Wealthy Portuguese Culture of Giving

Inês Freire de Andrade - 27302 / 3379

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under the supervision of:

Miguel Alves Martins

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Abstract

This thesis studies the Portuguese wealthy donors, in what concerns the motivations that drive their donations, the path they pursue to go from non-donors to loyal supporters, as well as the potential blockages in that path. To support this work, an international literature review was made, adding to six semi-structured interviews to representative individuals, to provide with insights from real Portuguese wealthy donors. Some recommendations were made to the nonprofit institutions, in order to engage better with donors and promote more donations.

Research Question: How can nonprofits better engage with wealthy donors in Portugal?

Keywords:

- Giving
- Philanthropy
- Charity
- Journey

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Introduction

The issue of **why individuals choose to support social causes** has been the focus of considerable research in the disciplines of economics, psychology, sociology, anthropology, management and marketing. (Sargeant and Woodlife, 2007) Adding to this, there is a growing interest from financial and social institutions to **better understand wealthy individuals**, as they are able to make larger contributions that can change the course of those institutions. (Schervish, 2001) However, in Portugal there is a lack of studies made on this topic, which motivated this research, being part of a project for Fundação Calouste Gulbenkian, on the Wealthy Portuguese Culture of Philanthropy.

Therefore, this thesis studies the Portuguese wealthy donors, especially in what concerns the motivations that drive their donations, the journey they pursue to go from non-donors to loyal supporters, as well as the potential blockages in that journey. With this study, it will be possible to start the path of understanding how nonprofits can engage better with donors and promote more donations and allow for others to complete this study.

Literature Review

Giving

Giving is considered to be "*a voluntary charitable donation by an individual to a not-for-profit organization*" (Bekkers and Wiepking, 2007). Giving may imply a variety of exchanges, as donations can be in the form of money, property, time, expertise or even body parts. (Abreu, 2012)

The act of Giving can be pursued through several ways, depending on the target population of the donation; the method used; whether it tackles the causes or the symptoms of the problem; whether the support is made with a short term perspective, or a long term one; their expectation of the level of impact; and their expected financial return. According with these criteria, one can define seven ways of giving, which are described in the Appendix 1 [See Table 1].

Adding to this, each country has its own Culture of Giving, according with the influence of Religion(s), Politics and State, Family Ties and Giving Tradition. For Portugal, the analysis made for this thesis can be seen in the Appendix 2 [See "The Portuguese Cultural Influences"].

The Supporter Decision Journey

Helping is a complex behavior that includes a set of psychological steps. (Guy and Patton, 1989). Many theories have been developed to modulate this "journey", such as "The helping decision process and potential mitigating factors" (Guy and Patton, 1989) and the "Giving behavior model" (Sargeant and Woodlife, 2007), which are further explained in the Appendix 3 [See Figures 2 and 3]. After analysing them, it was clear that the "Supporter Decision Journey", by Lauren Girardin, adapted from McKinsey's "Consumer Decision Journey", (McKinsey, 2009) was the most complete one, as it considers the steps after contributing.

According with this Marketing model, *"the decision-making process is a circular journey"*, with the following steps: Consideration, Evaluation, Moment of Action, Enjoying, Bonding, Advocating, and the Loyalty Loop [see Appendix 3 - Figure 4]. (McKinsey, 2009) When the trigger is to care about a social problem, we can turn this model into the "Supporter Decision Journey", where the goal is to inspire an impactful donation, which is depicted in the following scheme. (Girardin, 2011

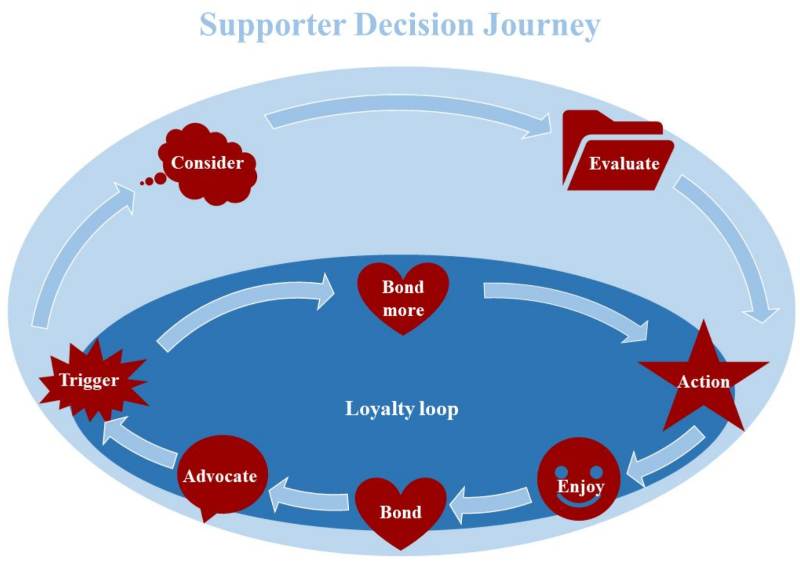

Figure 1: The Supporter Decision Journey (Girardin, 2011)

1. Trigger

Consumers get into a purchase journey when they receive a trigger. (Chan, 2015) There are many kinds of triggers, such as watching advertising of new products, dissatisfaction with old products or emotional messages that trigger a new need.

The Trigger for a supporter is the awareness of a social need. For that, the potential helper must recognize that someone is in a difficult circumstance, through the communication of the beneficiaries themselves or the organizations which support them. This trigger can be received in person or through the several media available. (Guy and Patton, 1989) Actually, studies found that the probability of people being aware and giving increases when the needs of victims are communicated. (Bekkers and Wiepking, 2011)

2. Consider

Consumers form opinions on brands by gathering impressions from advertisements and media, as well as from people they interact with. These impressions form what McKinsey & Company refers to as the *"Initial Consideration Set: the small number of brands consumers regard at the outset as potential purchasing options."* (Experticity, 2009; McKinsey, 2009)

At this stage of the Supporter Journey, the potential helper tends to interpret the situation and assess it in terms of: the intensity and urgency; the possible consequences to both parts; if the person in need is deserving of help; and the possible behavior of others that are also aware of the situation. (Guy and Patton, 1989) The supporter will think about the "Initial Consideration Set" of organizations and methods to address that social need, such as the organizations which work in that area and the impact their methods appear to have. Finally, in order to move through to the next stage, the supporter needs to recognize personal responsibility for the problem and feel able to provide the help. (Guy and Patton, 1989)

According to several studies, the way potential donors are solicited to donate determines the effectiveness of the solicitations themselves and the more opportunities to give people encounter, the more likely they are to give. (Bekkers, 2005; Lee & Farrell, 2003; Schlegelmilch, Love, & Diamantopoulos, 1997; Simmons & Emanuele, 2004; Wiepking & Maas, 2009; Bekkers and Wiepking, 2011) However, due to increasing numbers of solicitations, most people try to avoid being asked to contribute, (Pancer, McMullen, Kabatoff, Johnson, & Pond, 1979; Bekkers and Wiepking, 2011) being the standard response to reject it. (Diamond & Noble, 2001)

3. Evaluate

At this stage, consumers evaluate the brands being considered. They reduce the number of brands in the Consideration Set, by selecting and limiting certain features; but they also add new brands, as they learn more and their selection criteria change. (Edelmen, 2010) The consumer can access a variety of online and offline channels to get information. (Ryte, 2017)

In the Supporter Journey, donors will evaluate which possible organization is the best to support, by reaching out to their peers and using the same channels as regular consumers do. (Girardin, 2011) Depending on their profiles, they will value different criteria. The 2010 Study of High Net-Worth Philanthropy in the US (Osili et al., 2010) found that wealthy donors have high expectations of charitable organizations, ranking the following factors among those most important when determining which to support: (1) sound business and operational practices (87%); (2) Acknowledgement of contributions, including receipts (85%); (3) Appropriate expenditure on overhead (80%); (4) Protection of personal information (80%); and (5) Full financial disclosure (62%). (U.S. Trust, 2016) They typically gave to causes where they have **strong empathy or personal connection**, especially children's and caring for the sick. (Lincoln and Saxton, 2012)

Many donors feel the need to be highly involved in the work being done with their donations, in order to control it better (Lincoln and Saxton, 2012). This has lead in many cases to **Hyperagency**, which consists of the creation of new philanthropic organisations by donors. (Schervish, 2003;Taylor, 2008) Also, according to the World Wealth Report (Capgemini, 2010)and the Study of High Net-Worth Philanthropy (Osili et al., 2010), the growing desire among donors to ensure that their giving makes a difference has led to a demand for **professional advice**, mainly from accountants (68%), attorneys (41%) and financial/wealth advisors (39%). Various advisory institutions have emerged, who offer advice throughout the Supporter Decision Journey, to make investments that maximize social return on investment. However, research undertaken by Philanthropy Impact estimates that the proportion of wealthy people who use philanthropy advisors is still only 12%. (Lincoln and Saxton, 2012)

4. Moment of Action

After evaluating the brands in their "Consideration Set" according to the chosen criteria, customers decide to go for one specific brand and execute their purchase. (Lechelle, 2014)

In the case of supporters, they become convinced that one of the nonprofit organizations is worthy of receiving their donation, which can be financial, tangible, or intangible. (Girardin, 2011) Several authors have explored in detail some of the main motivations behind these donations and created typical charitable donor archetypes, which are further developed in the next section.

Still, there are many wealthy individuals who **do not donate**. Even if they have enough money to live on, some may want to become richer; they may feel like their duty is to preserve wealth for future generations; they might distrust charitable organizations, especially if there are recent financial scandals in the sector; and they may not see the tax incentives as a means of distributing revenue to donors' preferred causes. (Lincoln et al., 2012)

5. Enjoy

Once a consumer begins using a product, an opinion starts forming, depending on the expectations that person had before purchasing it. A lot of factors influence it, such as the way employees interact with the consumer, the person's ability to use the product, and the actual result that the product brings. The post-purchase experience shapes consumers' opinion for every subsequent decision in the category. (Experticity, 2017)

In the case of supporters, enjoying their donation might materialize in observing the positive impact made by it, if they receive news from the organization or are invited to be present at the delivery of the help to the beneficiaries. If that experience is positive, they feel good about their donation and may think about giving in the future to that organization. If it is negative and, for example, they learn their donation was misused or it was not effectively delivered to the beneficiaries, it will make them feel frustrated or even angry, and distrust the organization.

6. Bond

Harvard Business Review's studies revealed that people are motivated by their emotions to purchase products and that they make emotional bonds with companies. Once customers feel such a connection with a brand, they become loyal to it. (Joakim Thörn, 2016)

For nonprofits, it is also essential to bond with the supporter. Some organizations are able to make supporters feel empathy for the difficulties faced by their beneficiaries and the joy of giving to alleviate or solve it. The community effect tends to also be very strong, as groups of donors and volunteers get together to celebrate accomplishments. This can be achieved by ensuring that donors are making a difference; thanking and recognizing their contributions; enable them to meet people with the same passions; and good communication. (Lloyd, 2004)

However, specific attitudes from the organisations or changes of heart by the supporters may lead them to stop giving, according with the Study of High Net-Worth Philanthropy (Osili et al., 2010). Some of them are: being too frequently solicited or for an inappropriate amount (59%); deciding to support other causes (34%); changing their household circumstances (29%); losing involvement with the organization (12%); completion of the program (10%); and inaccurate records kept by the organization (10%). (Lincoln and Saxton, 2012)

7. Advocate

When consumers are pleased with a purchase, they will advocate for it by word of mouth, increasing the brand's potential. In opposition, if a consumer is disappointed by the brand, he or she may sever ties with it and share the bad experience with others. (Edelmen, 2010) Therefore, brands can tap into a more transparent form of marketing, which helps consumers aggregate recommendations straight from people who have firsthand experience.

For the Supporter Journey, advocacy means to speak up or to fight for a cause, being an important function of most nonprofit organizations. (Johnson, 2002) When supporters reach this stage of their journey, it means they are core supporters of the organization's mission, who tell their friends and family about the great work it is doing. Activating these individuals, will impact nonprofits' reach, credibility, campaign momentum and bottom line. Because they are real people with real connections to the organization's mission, their networks trust their opinions and their philanthropy is valued. In fact, social media ambassadors are 83% more likely to share information than the average user. (Social Factor, 2017)

8. Loyalty Loop

Loyalty means “a customer’s positive, active feelings of allegiance and affiliation with a brand.” (Ray, 2016) If consumers’ bond with a brand is strong enough, they repurchase it, without cycling through the earlier decision-journey stages, generating a loyalty loop. This happens when the purchase exceeds their expectations. (Thörn, 2016)

Just like in for-profit brands, nonprofits should try to turn, for example, Facebook “likes” into volunteers, volunteers into donors, and donors into advocates. This creates a “virtuous cycle of caring”, in which the engaged individuals will be loyal because they know that the organization makes a difference in the world. (Girardin, 2011)

Motivations Archetypes

Every donor has one or more motivations to pursue their supporter journeys. Several authors have described those donations and divided donors into archetypes, according with the origins of their motivations and how they express them in their behaviors. This lead to eight main archetypes:

I. ***“The Altruists”.*** Donors who believe they are giving because it “is the right thing to do”, due to a moral imperative. (LeRoux and Feeney, 2014) They feel obliged to give to those less fortunate and desire to “put something back” into society. (Lloyd, 2004) They might do this out of a sense of gratitude for the privileges they have, or as a way to contribute to their community. (Prince and File, 1994)

II. ***“The Devouts”.*** Donors who are motivated by the conviction of faith and of doing God’s will. (LeRoux and Feeney, 2014) They tend to give at their place of worship and have a deep sense of community. (Prince and File, 1994) Studies found that in the US 39% of those surveyed cited “religious beliefs” among their top motivations for giving. (Lincoln and Saxton, 2012) and that religious values and beliefs motivate philanthropic behavior (Cnaan, Kasternakis, & Wineburg, 1993; Norenzayan & Shariff, 2008).

III. *"The Dynasts".* Those donors who have inherited their wealth, and there is an expectation or tradition of supporting certain nonprofits. Therefore, they feel the pressure to continue or even ameliorate the family's giving. (LeRoux and Feeney, 2014) A study in the U.S. concluded that family background, upbringing, history of family giving brought a sense of responsibility to give. (Lloyd, 2004; Wilhelm et al., 2006)

IV. *"The Friends Supporters."* For this type of donors, the motivating factor is existing relationships, requests from peers, or knowing someone directly affected by an issue. (Prince and File, 1994) Actually, studies found that the probability of people being aware and giving increases when they know potential beneficiaries (Lee & Farrell, 2003; Small & Simonsohn, 2006; Bekkers and Wiepking, 2011);

V. *"Change Seekers."* The kind of people who demonstrate an interest in the impact of the organisation, (Prince and File, 1994) as they desire to make a difference and change society's systems or structures for the best. (Lloyd, 2004, 2004) The US 2010 Study of High Net-Worth Philanthropy (Osili et al., 2010) found that 72% of respondents reported the importance of believing that their gift will make a difference. (Lincoln et al., 2012) They tend to spend a long time thinking about decisions and weighing up options, (Prince and File, 1994).

VI. *"Self-actualization Searchers."* Those people who are searching for self-actualization and developing their own identity based on their giving. Actually, some theories link philanthropic giving to the pursuit of a moral and purposeful life, to finding happiness and fulfilment in life. (Lincoln and Saxton, 2012) Giving reinforces altruistic self-image, (Piliavin and Callero 1991; Lee, Piliavin, & Call, 1999) and enhances one's self esteem (Ickes, Kidd, & Berkowitz, 1976; Bekkers and Wiepking, 2011). Evidence also suggests that donations "elicit neural activity in areas linked to reward processing" (Harbaugh, Mayr, & Burghart, 2007), called by some the "joy of giving".

VII. ***"The Money-Driven."*** Those who see the act of giving as a good opportunity to expand business, being motivated mainly by tax breaks, or a publicity opportunity. (LeRoux and Feeney, 2014) This type of individuals may also donate for services that they may use now or later, such as clubs, hospitals and medical research (Sargeant & Woodliffe, 2007; Schervish & Havens, 2002). There is also evidence regarding the positive correlation between inheritance **tax breaks** and charitable gifting (Bakija, Gale and Slemrod, 2003), to which upper-income households seem to be particular sensitive (Duquette, 2016).

VIII. ***"The Socialites."*** Donors who benefit with the social accomplishments that giving brings to them, because it is a way to scale the social ladder, (LeRoux and Feeney, 2014) or being held in high regard by their peers (Wiepking, 2008a). In truth, people generally prefer their donations to be known by others (Andreoni & Petrie, 2004), in order to receive recognition and approval from others. Consequently, face-to-face solicitations are more effective than solicitations made over the telephone (Brockner, Guzzi, Kane, Levine, & Shaplen, 1984) or by post (Thornton, Kirchner, & Jacobs, 1991). Also, the level of publicity of the donation itself seems to contribute to larger donations (Alpizar et al., 2008; Bekkers and Wiepking, 2011).

Methodology

In order to support this work, a set of six semi-structured interviews [See Appendix for questions] was made to representative individuals, to provide with insights from real Portuguese wealthy donors. These individuals had a net-worth higher than one million euros, had donated in the last year more than one thousand euros to the social sector and were available to share their experience as donors. For confidentiality reasons, they will not be identified and their answers will be presented in a consolidated way. Putting together this information, some conclusions and recommendations to the nonprofit institutions were made, as well as suggestions on some topics which could be further developed, considering the limitations of the study.

Research

For this research, a set of semi-structured interviews [See Appendix 4 for questions] was made to six representative individuals, who had a net-worth higher than 1 million euros and had donated in the last year more than 1 thousand euros to the social sector. For confidentiality reasons, they will not be identified and their answers will be presented in a consolidated way. Based on the findings of the interviews and the literature review, the potential blockages at each stage were suggested.

1. Typical Major Donor Journeys

In order to understand the Portuguese wealthy donors, their "Supporter Decision Journey" and their motivations was studied, using semi-structured interviews as a research method. This approach maps a person's experience as a donor and help identify motivations and barriers. The individuals interviewed were divided into three groups, each with two interviewees, according to their profile ("Self-made Entrepreneurs", "High-level Managers" and "Fortune heirs"):

A. "Self-made Entrepreneurs"

These individuals created strong businesses through hard work and resilience. They are usually highly connected to their hometown and like to invest in the improvement of the people's living conditions, as they know their hardships very well. Through the interviews made, it was possible to conclude that:

- **Trigger.** The entrepreneurs interviewed were triggered to start their Supporter Decision Journey when they realized there were pressing social needs that were not being responded to and that they were able to tackle. This trigger was created by their own observation of the need in the field, as well as solicitations by the nonprofits.

- **Consider.** At this stage, the individuals felt able and responsible to help and started thinking about possible ways to tackle the problem. They immediately thought of the organizations whose coordinators they knew well.
- **Evaluate.** These individuals strongly valued their knowledge about the organizations to which they would donate and their control over the way that money would be used. Therefore, they preferred to give to people they were familiar with and to projects with very specific goals, avoiding any intermediary. They also evaluated the hypothesis of creating their own foundation, as a way to control even more the process (Hyperagency).
- **Moment of Action**. Both the interviewees contributed to nonprofits that support their hometowns, as they felt like one of the few who had the power to allow those organizations to survive. They also knew the people responsible for the organizations, which made them feel more trust towards their donations.
- **Enjoy.** They felt mostly proud of the impact achieved through their donations, especially when it came from the beneficiaries themselves. They believed one should not promote his or her contribution publicly, as it would diminish the moral value of their donation. In spite of that, they agreed that people should give more appreciation to people who give (in special to those who do not talk about it).
- **Bond.** Both the interviewed entrepreneurs keep a strong relationship with the organizations and people they help and, have a deep empathy for the difficulties they face. They have people in the field connecting them with the work made locally, who keep them up to dated.
- **Advocate.** The individuals preferred to keep their contributions unpromoted, as they do not want to be perceived as opportunistic or superficial. Therefore, they did not advocate for it.

- **Loyalty loop.** Both felt highly involved with the supported nonprofits, which recognized their donations locally. They follow regularly the evolution of the projects and the state of the population and are always open to be contacted directly. They do not have specific plan on what they want to do in the future as philanthropists, but show to be quite loyal to the organizations they have been supporting.

Archetypes: They had a strong emotional link with those towns and believed it was their moral duty to provide a better life to the local people, belonging to the *"Altruist"* archetype. They also showed concern for the actual impact made on the population affected and made sure their contribution would make a real change, showing to be part of the *"Change Seekers"* archetype.

B. "High-level Managers"

These individuals are highly educated and very career-focused. They have strong management skills and expertise, which they enjoy bringing to the social sector. When they reach the "top of the ladder", they search for other sources of self-actualization, which can mean donating for organizations or even starting their own projects. The interviews lead to conclude that:

- **Trigger.** What triggered the donations of this type of donors was the solicitation of their participation in the social project. It was made by professionals who knew how to involve the potential donors in the project, so that their relationship with it became more emotional and, therefore, more probable to materialize into a large donation. They were also able to inspire the potential donors and to communicate the importance of the project for the future of the Portuguese society, motivating them to contribute. They ended with an actual solicitation, which still had to be made, or it would be likely that the individuals would still end up not contributing.
- **Consider.** The interviewees had an old relationship with this organization, so it was already in their Initial Consideration Set, along with other organizations in the same area that they

might have known from personal experience or word of mouth. They also felt the responsibility and the ability of contribute for the cause, which they quickly considered important, deserving and urgent.

- **Evaluate.** In order to evaluate the alternative projects they could donate to, the interviewees had some criteria chosen, aligned with their personal motivations, such as: their personal connection with the project; the professionalism of the people in charge of the organization; the potential impact of the project in transforming people's lives and the multiplying effect of the value created for a more efficient society.
- **Moment of Action**. They decided to give to projects which respected their needs, stated in the previous step. They had a strong personal connection with the projects, they knew well the people in charge and saw them as good professionals, and they believed those projects would be able to create enough impact.
- **Enjoy.** The interviewees showed to have great pleasure in collaborating in the preparation and implementation of the project, especially when their professional skills were useful. They showed high levels of satisfaction with the "product" offered, meaning the emotional benefits and the expectations of their donations' impact.
- **Bond.** The individuals showed a high level of bonding with the organization, which had been reinforced through several events and dedicated communication. They feel proud of belonging to a community of like-minded donors who supported the project and believe in a promising future of the organization. They also seemed satisfied with the level of recognition and gratitude expressed by the organization.
- **Advocate.** Although they feel passionate about the project, they did not refer any advocacy made to bring more donors to community.

- **Loyalty loop.** Both the interviewees seemed very committed to the vision of the organization and showed interest in helping it again when asked. They see themselves as sources of knowledge that might be very useful for the organization in the future, and feel happy to follow the development of the project. However, they also see the possibility of getting involved with other organizations, if they see this project's mission accomplished.

Archetypes: The motivation archetypes common in this type of donors were mainly four. The *"Altruist"* was always present, as they felt the need to "give back" to society what they received, and the obligation to do something useful for the less fortunate. Connected to this, they expressed the motivation to change society for the better and having a positive impact in the areas they most value, showing to belong also to the *"Change Seeker"* archetype. They also referred the personal connections as a driver for their involvement in social projects, being *"Friends Supporters"* in some occasions. Finally, they strongly valued leaving a legacy of their work for future generations that they can feel proud of, being *"Self-actualization Searchers"*.

C. "Fortune heirs"

This type of supporters come from a wealthy family, growing up surrounded by wealth but conscious of the difficulties lived by the majority of people. Some might have already been involved with the family's charitable giving, which has a strong history, but not with the responsibility of deciding how to give. The retirement or death of the family member in charge of philanthropy leads to the need for getting engaged in every decision. This person might want to keep the family's traditional philanthropy or innovate in terms of causes to support, organizations to donate to, methods and amounts of giving. The interviews made it was possible to conclude that:

- **Trigger.** The individuals interviewed referred mainly two types of triggers for donating: firstly, solicitations - the nonprofit organizations contact them in order to donate for a specific need; secondly, the identification of an emergent need, for example, the wildfires of the last year in Portugal. Consequently, they do not have a specific plan to follow for their donations, and tend to be more reactive than active.

- **Consider.** Their “Initial Consideration Set” was also composed of organizations they already knew personally, and with whom they had a previous relationship.
- **Evaluate.** The criteria used to choose between causes and organizations were the following: the geographic location, preferring organizations closer to their place of residence or connected with their family roots; the impact they believed their donation was able to make; and the credibility of the people managing the nonprofit and the donors’ trust in them, since they fear being cheated.
- **Moment of Action.** They chose to support nonprofits close to their family roots, in which they personally knew the coordinators and where they felt that their donations would actually change lives for the better.
- **Enjoy.** The two individuals highlighted that donors should not expect recognition nor use their donations as was to publicize themselves.
- **Bond.** The interviewees were both highly involved with the organizations they donated to, being part of the nonprofits boards and following their activities closely. The nonprofits also did their part, inviting the donors to be present in special events and in the decision making.
- **Advocate.** The donors are proud of their contributions and are glad to invite their friends to contribute. However, in order to avoid making publicity of themselves, they are not very active advocates.
- **Loyalty loop.** They were both highly connected with the organizations supported and showed intention to keep their relationship with them. In spite of that, they also consider donating to other causes and organizations, if they are well solicited.

Archetypes: Both the interviewees showed a big concern about sharing and collaborating with those less fortunate or to organizations whose mission they believed in, because they felt it is their duty as wealthy individuals - showing to be *"Altruists"*. They also showed to belong to the *"Change Seekers"* archetype, as they referred several times the need to make a positive impact in the communities affected, either in the people directly affected by their donations, either in the locations' identity. Although not stated specifically, as they are both heirs of high-level individuals known by their philanthropy, it is believed that the *"Dynast"* archetype was also present in their minds and motivated them to continue their family's legacy of giving.

These donor journeys show that for most people the philanthropic journey is **not simple path**. The journey requires self-reflection, willingness to learn from others, and the ability to find sources of information. This can lead to dissatisfaction — either with giving in general or the systems in place.

2. Blockages in the Supporter Decision Journey in Portugal

According to the previous analysis of the Supporters Decision Journey, the motivations and the influences of the Portuguese culture [See Appendix], it is time to suggest the possible blockages:

- **Trigger.** There are two main sources of triggers for giving in Portugal: direct solicitation from organizations, or mass media news about the most urgent social problems. Both are currently made in a disorganized way, with a lack of articulation between organizations, in many cases duplicating efforts. Adding to this, most nonprofits have few fundraising capacities, being performed by volunteers without any training or expertise. Also, the mass media focus mainly on big emergencies or festive seasons, not supporting the communication of nonprofits throughout the year.
- **Consider.** Many Portuguese are starting to demand accountability and transparency from nonprofits, so they know exactly how the donations are being used, due to the lack of trust observed in the interviews.

- **Evaluate.** The information about social causes and organizations in Portugal is scattered and incomplete, which makes it very hard for potential donors to evaluate correctly the professionalism and the potential impact of the nonprofits. Also, there are currently very few philanthropy advisors in Portugal, with the exception of the Edmond de Rothschild bank and a small set of social consultants offering donor counseling services to the corporate sector. These factors combined make it very hard for donors to correctly choose their recipients and knowing who to trust, ending up supporting only the organizations managed by their personal connections. Therefore, there is still a great need for donor advisory and education.
- **Moment of Action**. Although there are no extensive studies available on the main motivations of the Portuguese to give, one can say that the influence of the Christian values has lead to a strong presence of the *"Altruists"* and the *"Devouts"* archetypes. There are several types of religious institutions people can donate to, such as the "Misericórdias" and the local parishes, as well as general charities in all social areas, and the various channels available make it very easy for donors to contribute. The same applies to most of the Portuguese *"Self-actualization Searchers"*, since giving to ephemeral relief is enough, considering the Christian Charity values. By contrast, for the *"Change Seekers"* archetype it is challenging to find projects with a strong focus on impact and its measurement. Most nonprofits worry more about their outputs, instead of their outcomes and consequent impact on the target population, which makes it easy to "fall" into assistencialism without noticing. Only recently some organizations have started measuring the change made by social projects, such as Laboratório de Investimento Social. For the *"Friends Supporters"* it is much easier to find matching projects, since they simply respond to family or friends' requests - it is easy to deliver the funds, while it also guarantees a certain degree of trust, which unknown fundraisers do not achieve easily. Regarding the *"Dynasts"*, they have the

possibility of continuing their family's traditional donations, or creating a new strategy by themselves. The last option may be hard if they do not have the required expertise, since the advisors in this field are very scarce. For the *"Money-Driven"* who have a high level of income and want to reduce taxes paid, they can choose any of the hundreds of organizations that qualify for the patronage statute and get a tax break. They can also easily find a nonprofit that will benefit them personally, such as a club or a nursing home. Finally, for the "*Socialites",* it is considered rude to publicize the donations made for personal gain, but many people find ways to show they have given and to benefit from that.

- **Enjoy.** Depending on their motivations to give, it might be easier or harder for the Portuguese to enjoy their donations. If the organizations allow donors to see and even participate in the delivery of the social product or service to the beneficiaries, it will probably bring enjoyment to the *"Altruists"*, the *"Devouts"* and the *"Self-actualization Searchers"*. For the *"Change Seekers",* it would be necessary to have proof that such product or service offered made actual change in the lives of the beneficiaries, who will then have a better life. In the case of the *"Friends Supporters",* they simply need to feel that they made their friend happy and grateful for their donation, independently of its actual impact. Regarding the *"Dynasts"*, they need to believe their ancestors would be proud of the usage they are making of the family money and that the family name is being preserved. For the *"Money-Driven"*, having the expected tax break and the promise of the future personal benefit is enough to enjoy their donation. Lastly, for the "*Socialites",* being perceived as benefactors by many people and becoming more popular will satisfy their need.
- **Bond.** For the Portuguese donors to bond with the national nonprofits, there must be an effort from the organizations to involve them in their activities and celebrations. For volunteers, this is already common in the Portuguese nonprofits. However, most do not

focus on bonding with their supporters and nurturing a long-term relationship (although this was not observed in the interviews, as the donors seemed highly involved with the nonprofits).

- **Advocate.** In order to become advocates, the Portuguese supporters need to be highly involved with the nonprofits and perceive their advocacy as something positive for them. Since the national culture negatively regards publicising personal donations, as well as asking for money to others, it might be hard to convince them to do it, as the interviews made showed (none of the interviewees considered being an advocate).
- **Loyalty loop.** Finally, this may lead to irregular, sporadic and disconnected donations, which harm the sustainability of the social sector. There is a need for capacity building and professionalization of the social sector, so that the Supporter Decision Journeys of the wealthy individuals are followed efficiently and a high level of engagement with the nonprofits leads to long-lasting loyalty loops.

Recommendations

In order to obtain more consistent and higher donations, as to become sustainable and achieve their missions, there are many initiatives the Portuguese nonprofits might pursue. First of all, they should consider **(1) providing training and compensation to their collaborators**, so they can perform their tasks with professional-level quality. Then, they can improve their fundraising capacities and obtain better funding. Secondly, there is a strong need to **(2) develop a collaborative culture between nonprofits, the state and the private sector,** (including the mass media) where resources and knowledge are shared and all contribute to the **(3) aggregation of information** about the funds received, their application and the impact achieved, in order to bring more transparency and credibility to the ecosystem. (Chia, 2015) The need for donor advisory and education can be responded by the nonprofits themselves, by **(4) developing specialized departments** in law offices or banks, or by new advisory firms. Finally, nonprofits who want to grow and become sustainable need to become experts in **(5) turning loyal donors into advocates**, in order to reach more potential donors, who will be more easily convinced by the current ones. If all this work is done correctly, they will have "friendraisers" for life, (Barker et al., 2011) highly dedicated to the nonprofits' mission, who will contribute and evangelize it.

Conclusions

With this analysis [See Appendix 5], one can firstly suggest that the Portuguese wealthy individuals are more prone to respond to **solicitations** instead of having a proactive and planned approach to nonprofits. This was observed in all the interviews made, and is aligned with the international literature found. This behavior might result from the lack of professionalism and articulation of nonprofits' fundraising, as well as the mass media's focus on social emergencies rather than on long-term social causes.

Secondly, one can say the all studied sample was highly inclined to **consider** organizations whose coordinators they knew personally and trusted, instead of considering first its urgency, its importance and whether or not the beneficiaries deserved the help, as the literature review suggested. Both the "High-Level Managers" and the "Fortune Heirs" evaluated their possible recipients based on their personal connection with the organisations and the coordinators' professionalism, since it was the best way to make sure their money would be used correctly. The "Self-made Entrepreneurs" went even further in the **need for control**, considering the hypothesis of creating their own organization, like Schervish (2003) and Taylor (2008) suggested. Criteria from the literature, such as recognition, privacy and financial disclosure were not mentioned. This distrust is probably due to the lack of tools available to assess the quality and the potential impacts of the projects, with scattered information and few advisors in Portugal.

The interviewees **decided to give** to organizations they trusted and with whom they have stronger emotional connections, being mostly motivated by Altruism, probably due to influences of the Catholic Church in the culture [see Appendix 2], as well as by the Impact the project were expected to achieve in the helped communities. The "High-Level Managers" also felt motivation to donate to friends' projects and in order to feel higher self-actualization, while the "Fortune Heirs" showed to care about keeping the family's tradition of giving.

Although the literature incentivized nonprofits to give a lot of **recognition** to donors, the individuals interviewed said that donors should not expect it. For them, the most important factor to enjoy the donation was to feel proud of the impact made. However, for those who want to see actual change in society, it might be harder to find organizations that are able to offer them actual measuring of that impact.

All the interviewees showed to have **close relationships** with the organizations they supported, following their evolution on a regular basis and being satisfied with the gratitude of the organization. It seemed that those organizations followed the suggestions of the literature for bonding with donors. In spite of that, the literature did not preview that they were not able to turn these donors into **advocates**, since all of the individuals interviewed avoided sharing their relationship with the nonprofits, by fear of being interpreted as "opportunists".

One can still conclude that the donors studied felt loyal to the organizations they supported, which means that some of the work made in their "Supporter Decision Journey" was effective. Of course, there is still a lot to improve, and, for that reason, a few recommendations were made in the previous section. It is also possible to see that the three types ("Self-Made Entrepreneurs", "High-Level Managers" and "Fortune Heirs") of donors ended up having several similarities in their journeys, which suggests that the **life paths of donors are not as relevant as it was predicted** in the beginning of this work. Regarding the literature, one can see that, in some stages of the journey, it is very similar to the observed reality, while in other stages it is rather different.

It is important to refer that this research has several **limitations**, since it used a very small sample for the interviews, due to lack of time and availability of the target interviewees; and the research method used (semi-structured interviews) is only qualitative, not allowing for quantitative analysis.

In order to compensate these limitations, some **topics for further development are suggested**: (a) a quantitative study on the motivations of the Portuguese to donate to social causes; (b) an extensive study the current processes of donor management pursued by the Portuguese nonprofits; (c) a study to understand the factors that might drive giving in each key media; (d) a study to compare the philanthropy by Generations Y and Z with the one made by Baby Boomers and Generation X.

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Appendix

1.Ways of Giving

Ways	Goal(s)	Addresses causes or symptoms?	Short or long term?	Expect impact?	Expect return?
Charity	Relief of unfortunate or needy people	Symptoms	Short	No	No
Solidarity	Support the people affected by inequity	Symptoms	Short	No	No
Philanthropy	Resolving or preventing a neglected problem	Causes	Long	Yes	No
Venture Philanthropy	Building nonprofits' capacity for sustainable growth and systemic change	Causes	Long	Yes	Depends
Social Investing	Supporting projects with high social impact	Causes	Long	Yes	No
Impact Investing	address the world's most critical problems, while having return	Causes	Long	Yes	Yes
Corporate Social Responsibility	strategic advantage and an innovative edge	Causes	Long	No	Yes

Table 1 - Ways of Giving systematized

- **Charity**. *"Relief of unfortunate or needy people"* (Taggart), out of *"generosity and helpfulness"* (Merriam Webster Dictionary). It has become professionalized and is now an organized system of social institutions which provides assistance to the needy. (Taggart) It usually addresses short-term social problems, focusing more on their symptoms instead of their root causes. (Leisinger, 2007) It is often based on the premise that marginalized people have a deficit and that the giver has the expertise to decide what they need and how to provide it.
- **Solidarity**. Concept very similar to Charity, but it encompasses the idea that conditions of inequity are created by the dominant culture and that the recipient is the best to determine its own needs. (Wise, 2012)
- **Philanthropy.** Traditionally, it was confused with Charity. It has evolved to cover a broader spectrum of societal issues and aiming to improve the quality of life for all (Fieldmann, 2014). Therefore, it encompasses charity. (Taggart, 2017) It consists of resolving or preventing a neglected problem, by addressing its root causes (Leisinger, 2011), in a long-term perspective (Dietlin, 2010), without expecting a financial return.
- **Venture philanthropy.** Emerged as an adaptation of the venture-capital model for the social sector. (Social Innovation, 2016) Aims to create systemic change, engaging all actors. (Lincoln et al., 2012) In return for their capital, venture philanthropists seek social impact and sometimes also financial return. (Frumkin, 2003; Moskowitz, 2017) They tend to provide long-term investment for capacity building (Moskowitz, 2017; Lincoln et al., 2012); to be highly engaged in the operations; (Chia, 2015; Santos, 2017; Moskowitz, 2017; Lincoln et al., 2012); and to demand detailed performance and impact measurement. (Chia, 2015; Moskowitz, 2017; Lincoln et al., 2012)

- **Social Investing.** Funding that may generate a financial return, but where societal impact comes first. (Moskowitz, 2017) It aims to support projects with high social impact, which address the causes of the problem, with a long-term perspective.
- **Impact Investing.** Similar to Social Investing, but aiming for a financial return while making a positive impact on the world, by *"mobilizing large pools of private capital from new sources to address the world's most critical problems."* (Rockefeller Foundation, 2007; Moskowitz, 2017)
- **Corporate Social Responsibility.** Programs integrated with business strategy and operations of companies. They are mainly seen as a strategic advantage and an innovative edge. (Donation Exchange, 2017)

2. The Portuguese Cultural Influences

The Portuguese major donors of today have been influenced by many historical and current factors. In this section, an analysis of some of these influences will be made.

- **Religion**. Since the birth of Portugal, the Roman Catholic Church has had a great influence over the culture of giving of its population. The religious institutions assisted the sick, the poor, pilgrims and orphans (Franco, 2015), and evangelized the Christian Charity as a duty of the wealthy. This influence is still strong today and motivates many individuals to donate to the needy and to religious-related causes. However, it has also slowed the country's evolution towards philanthropy and other ways of giving focused on efficiency and impact.
- **State.** As a Latin-mediterranean country, Portugal has certain characteristics of Civil Society that are common among these countries. One of them is the strong role of the State, which is responsible for assuring the social goods and services. The Civic Society Organizations and Foundations face the challenge of being accepted as independent and autonomous entities.

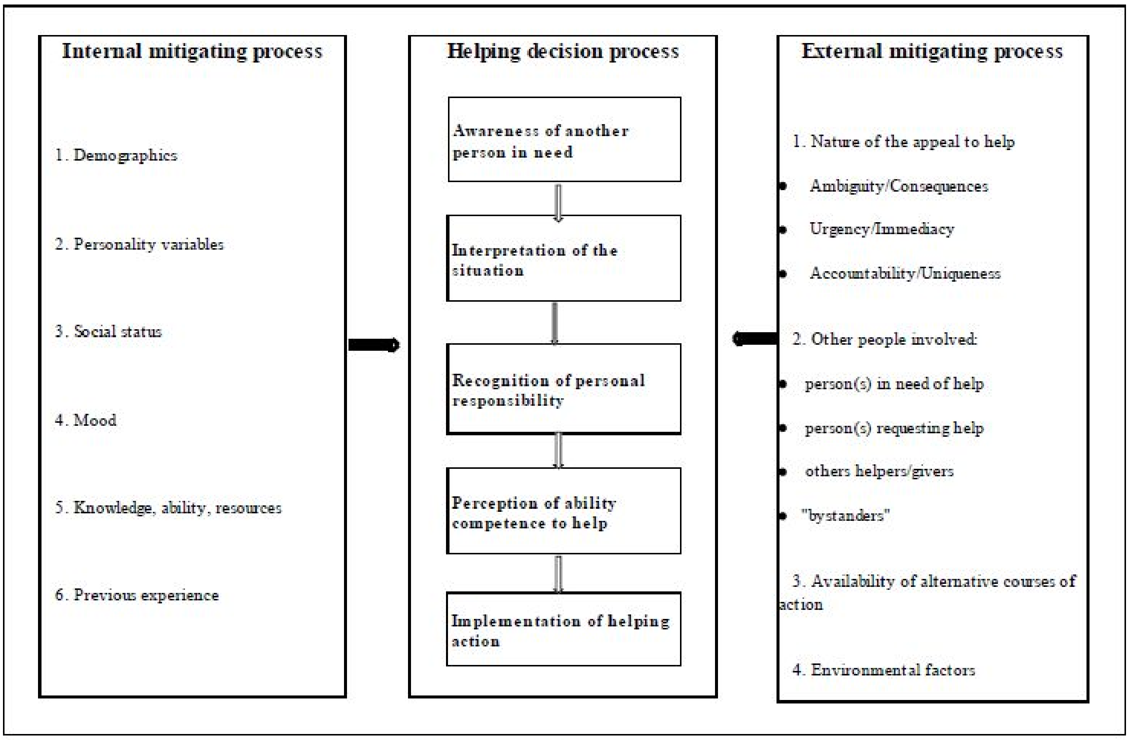
For donors, it is not clear to many people that there are tax breaks for donations, (MacDonald, Borms et. al.; 2008). This shows a lack of interest from the state in incentivizing donations. The people's confidence in the state to solve social problems has been decreasing.

- **Family.** The strong family ties and communal character of the Portuguese culture have also shaped people's giving, which has concentrated the giving inside small communities, instead of to outside institutions or people.
- **Donations.** They are more responsive to mediatic events or proximity, and not the actual needs; and most of them are irregular, which makes it harder for organizations to sustain their activity. Also, there is a culture of shame of publicizing too much one's giving, as it is perceived as an egoistic motivation to gain social and economic credit from donations.

3. The Supporter Decision Journey

Alternative theories to explain the "journey" made by donors:

a. “The helping decision process and potential mitigating factors”



Source: Guy, Bonnie. S., Patton, Wesley E. 1989. The marketing of altruistic causes: Understanding why people help. The Journal of Consumer Marketing. 6 (1) 19-30.

Figure 2: “The helping decision process and potential mitigating factors”

(Guy and Patton, 1989)

“The helping decision process begins with awareness of the other person’s need: the potential helper must recognize that another is in difficult circumstance, like hearing a cry or watching an earthquake on television. Then, the potential helper must interpret the situation and evaluate the situation in terms of the intensity and urgency of the need; the possible consequences to both parts, the extent to which the needy person is deserving of help and the possible behavior of others that are also aware of the situation. The recognition of personal responsibility means that the person should recognize himself as the one that can provide the help. Furthermore, the helper must see himself with the ability to help and the helper must, accordingly, identify a course of action to be performed and to identify in this action the possibility of solving the problem. The final step of this

process addresses the implementation of the helping action (Guy and Patton, 1989). These steps of the decision process of helping are depicted in the (...) figure: the process flows from the top box (...).”(Abreu, 2012)

b. “The Giving Behavior Model” (Sargeant and Woodlife, 2007)

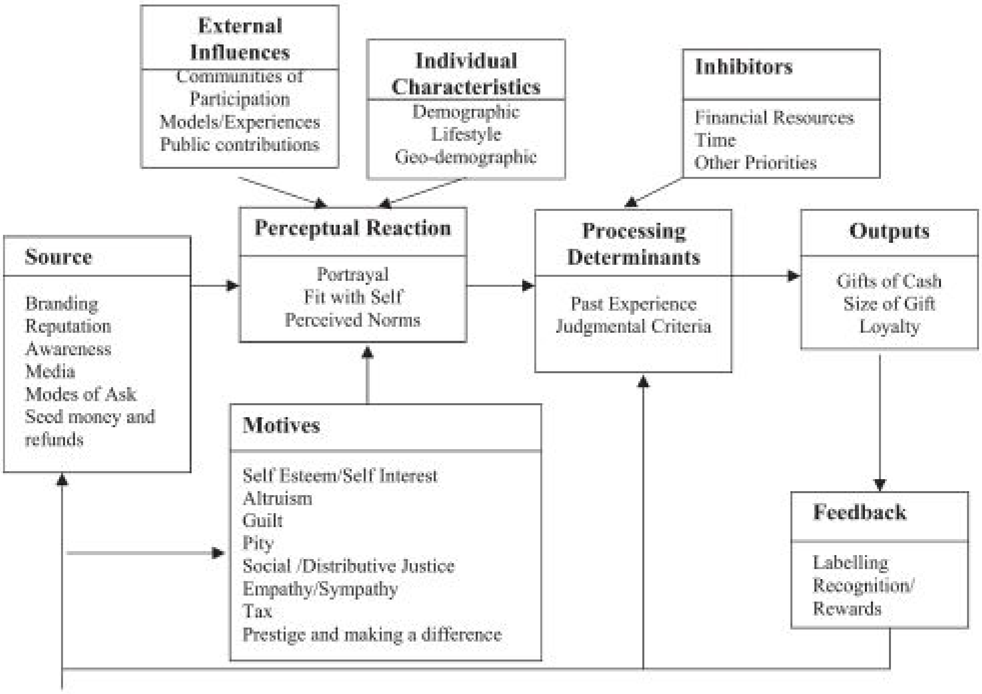


Figure 3: Giving behavior model. (Sargeant and Woodlife, 2007)

“This paper draws together extant work, developing a content model of giving behavior that fundraisers may use to inform their professional practice. At each stage, the ways in which nonprofits can manipulate their promotional activity to maximize the likelihood of support are presented.

- ***Source.*** *Analysis begins by examining extant work on the ‘source’ of the fundraising solicitation.*
- ***Branding.*** *As Tapp (1996, p. 335) notes, while ‘charities do not describe much of what they do as ‘‘branding,’’ organizations have long been concerned with maintaining a consistent*

style and tone of voice and conducting periodic reviews of both policies and actions to ensure that a consistent personality is projected.'

- ***Reputation and awareness.*** *Work by Kelman (1961) suggested that messages are more likely to be accepted by donors when the organization is already known to them and is perceived as reputable.*
- ***Media.*** *Nonprofits currently engage in a variety of different fundraising techniques employing media (...). An emergent body of literature on benchmarking the performance of specific media suggests that both initial returns and the lifetime value of supporters recruited will vary by media employed (Sargeant and McKenzie, 1998; Sargeant et al., 2006).*
- ***Mode of ask.*** *As Levis (1990) reminds us, to get a donation it is necessary to ask, since few gifts arrive unsolicited. The form of the solicitation, or mode of ask, has received considerable attention.*
- ***Seed money and refunds.*** *Some professional fundraisers believe that a substantial amount (40–50%) of the total fundraising goal should be pledged as seed money before starting a public campaign. (Fundraising School, 1999)*
- ***Perceptual reaction.*** *Whatever form the ask might eventually take, there are a number of variables which the literature suggests will tend to impact on a potential donor's perceptual reaction to the message being conveyed.*
- ***Portrayal.*** *The manner in which charitable beneficiaries should be depicted in fundraising communications has received considerable attention in the literature.*
- ***Fit with self.*** *In respect of the second variable, fit with desired self-image, Coliazzi et al. (1984) noted that individuals are more likely to help those that are perceived as being*

similar to themselves. They will thus tend to filter those messages from charities existing to support disparate segments of society.

- ***Processing determinants:***
  - ***Judgmental criteria.*** *Economists have long argued that donors make decisions in respect of their giving by reference to the degree of utility they will attain (Collard, 1978). While historically it was argued that this would take material form, it has recently been accepted that utility may also derive from the emotions evoked from giving (Arrow, 1972).*
  - ***Past experience.*** *A variety of authors have argued that once recruited to support a charity, a given donor will be significantly more likely to give again in the future (see, e.g., Kaehler and Sargeant, 1998). This may be because donors begin to build trust with the organization, which in turn fosters commitment and higher levels of support over time.*
- ***External influences**:*
  - ***Models/experiences.*** *Schervish and Havens (1997) argue that models and experiences from one's youth will shape future adult giving behavior. Thus those growing up in a family with a strong tradition of charitable support will be significantly more likely to exhibit such behaviors themselves.*
  - ***Communities of participation.*** *Communities of participation are networks of formal and informal relationships entered into either by choice or by circumstance (e.g., schools, soup kitchens, and soccer groups) that bring an individual into contact with need.*

    - ***Public policy contributions and crowding out.*** *The majority of studies on this topic suggest that government contributions discourage or crowd out private contributions, but that the crowding out is incomplete.*
- ***Individual characteristics****:*
    - ***Demographics.*** *A variety of demographic factors can influence giving. Variables, such as age (Halfpenny, 1990; Nichols, 1992; Pharoah and Tanner, 1997), gender (Mesch et al., 2002; Hall, 2004), social class (Jones and Posnett, 1991; Bryant et al., 2003; McClelland and Brooks, 2004), social norms (Morgan et al., 1979; Piliavin and Chang, 1990; Radley and Kennedy, 1995), and the degree of religious conviction (Halfpenny, 1990; Pharoah and Tanner, 1997; Jackson, 2001), have all been shown to impact on giving behavior.*
    - ***Lifestyle/geo-demographic.*** *The personality of a given individual does not in general appear to be a good indicator of charity support (Penrod, 1983) although there is some evidence that intrinsically motivated people do more for charity than self-centered, external reward seekers (Reykowski, 1982).*
- ***Motives.*** *There are a variety of intrinsic motives for charitable support. Motives can assist donors in filtering out those charity appeals that are likely to be of most relevance and can help in structuring the evaluation process that will subsequently be conducted to ultimately define the pattern of support exhibited.*
    - ***Altruism and self-interest*** *As discussed above, authors such as Collard (1978) argue that all giving can be explained by reference to the benefits that will accrue to the donor as a consequence of their gift. In this sense the process is rational and the donor simply evaluates the costs and benefits of engaging in a particular donation.*

- **Empathy.** *Empathy may be defined as an individual's emotional arousal elicited by the expression of emotion in another (Berger, 1962; Aronfeed, 1968; Shelton and Rogers, 1981).*
- **Sympathy.** *The motive 'sympathy' has also received attention in the literature, largely being viewed as a value expressive function, aiding individuals to conform to personally held norms (Schwartz, 1977; Clary and Snyder, 1991). Again, there would appear to be a relationship between the degree of sympathy engendered and both the propensity to donate and the chosen level of support (Batson, 1990).*
- **Fear/pity/guilt.** *A variety of other potential motives for giving have been identified including fear, guilt, and pity. These have been found to impact positively both on compliance and the extent thereof (Krebs and Whitten, 1972; Pieper, 1975).*
- **Social justice.** *Miller (1977) argued from social justice motivation theory (Lerner, 1975) that if people witness undue suffering their belief in a just world will be threatened—consequently they will be motivated to respond to restore their faith in a just world.*
- **Prestige and 'making a difference'.** *Two newer and related motives for philanthropy have been identified as prestige (donors being motivated by the public recognition their contributions bring) and the desire to make a difference, known as impact philanthropy.*
- **Tax.** *A number of studies have examined the relationship between income tax rates and charitable support and although findings vary, the responsiveness of individual giving to changes in taxation appears relatively great (Clotfelter, 1985)*

- **Inhibitors.** *A number of factors have been shown to inhibit individual giving. Riecken et al. (1994) contend that a lack of money, time, or ego risks are the most notable of these. In* *respect of the latter Steffey and Jones (1988) concur that some donors may experience anxiety over ridicule that may result from the support of unpopular or 'fringe' causes (see also Yavas and Riecken, 1985). A further notable barrier to giving has been shown to be doubts over the worthiness of the cause (Wagner and Wheeler, 1969; Ford, 1976; Mahatoo and Banting, 1988) and in particular concerns in respect of how the donated resources will actually be used (Shuptrine and Moore, 1980)*

- ***Feedback.*** *Having decided to offer a donation to a nonprofit, donors will typically be thanked by the respective organization in the hope that this will be the first stage in building an ongoing relationship with the individual concerned.*
    - ***Labeling*** *In thanking donors for their gift organizations often append labels to the donor, such as kind, generous, and/or helpful.*
    - ***Recognition/rewards.*** *The fundraising literature is replete with references to the need for adequate donor recognition (e.g., McKinnon, 1999; Warwick and Hitchcock, 2001; Irwin-Wells, 2002). Failure to provide adequate and appropriate recognition, it has been argued, will lead either to a lowering of future support or its complete termination (Boulding, 1973)."*

(Sargeant and Woodlife, 2007)

c. “The Consumer Decision Journey”

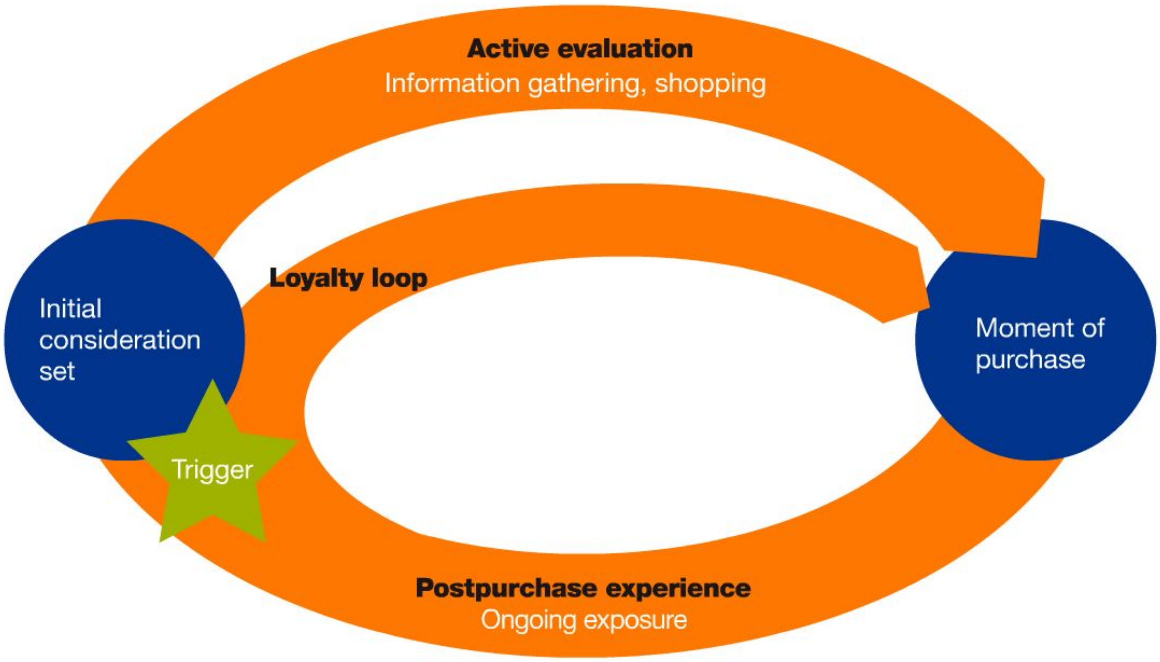


Figure 4 - “Consumer Decision Journey” (McKinsey)

“(...) the decision-making process is a more circular journey, with four primary phases representing potential battlegrounds where marketers can win or lose: initial consideration; active evaluation, or the process of researching potential purchases; closure, when consumers buy brands; and postpurchase, when consumers experience them (Exhibit 2).

- ***Brand consideration.** (...) In our qualitative research, consumers told us that the fragmenting of media and the proliferation of products have actually made them reduce the number of brands they consider at the outset. Faced with a plethora of choices and communications, consumers tend to fall back on the limited set of brands that have made it through the wilderness of messages. Brand awareness matters: brands in the initial-consideration set can be up to three times more likely to be purchased eventually than brands that aren’t in it. Not all is lost for brands excluded from this first stage, however.*

Contrary to the funnel metaphor, the number of brands under consideration during the active-evaluation phase may now actually expand rather than narrow as consumers seek information and shop a category. Brands may "interrupt" the decision-making process by entering into consideration and even force the exit of rivals. The number of brands added in later stages differs by industry: our research showed that people actively evaluating personal computers added an average of 1 brand to their initial-consideration set of 1.7, while automobile shoppers added 2.2 to their initial set of 3.8 (...). This change in behavior creates opportunities for marketers by adding touch points when brands can make an impact. Brands already under consideration can no longer take that status for granted.

- ***Empowered consumers.*** *The second profound change is that outreach of consumers to marketers has become dramatically more important than marketers' outreach to consumers. (...) In today's decision journey, consumer-driven marketing is increasingly important as customers seize control of the process and actively "pull" information helpful to them. Our research found that two-thirds of the touch points during the active-evaluation phase involve consumer-driven marketing activities, such as Internet reviews and word-of-mouth recommendations from friends and family, as well as in-store interactions and recollections of past experiences. A third of the touch points involve company-driven marketing (...). Traditional marketing remains important, but the change in the way consumers make decisions means that marketers must move aggressively beyond purely push-style communication and learn to influence consumer-driven touch points, such as word-of-mouth and Internet information sites.*
- ***Two types of loyalty.*** *When consumers reach a decision at the moment of purchase, the marketer's work has just begun: the postpurchase experience shapes their opinion for every subsequent decision in the category, so the journey is an ongoing cycle. More than 60*

percent of consumers of facial skin care products, for example, go online to conduct further research after the purchase—a touch point unimaginable when the funnel was conceived. Although the need to provide an after-sales experience that inspires loyalty and therefore repeat purchases isn't new, not all loyalty is equal in today's increasingly competitive, complex world. Of consumers who profess loyalty to a brand, some are active loyalists, who not only stick with it but also recommend it. Others are passive loyalists who, whether from laziness or confusion caused by the dizzying array of choices, stay with a brand without being committed to it. Despite their claims of allegiance, passive consumers are open to messages from competitors who give them a reason to switch. All marketers should make expanding the base of active loyalists a priority, and to do so they must focus their spending on the new touch points. That will require entirely new marketing efforts, not just investments in Internet sites and efforts to drive word-of-mouth or a renewed commitment to customer satisfaction.

- ***Aligning marketing with the consumer decision journey.*** *Developing a deep knowledge of how consumers make decisions is the first step. For most marketers, the difficult part is focusing strategies and spending on the most influential touch points. In some cases, the marketing effort's direction must change, perhaps from focusing brand advertising on the initial-consideration phase to developing Internet properties that help consumers gain a better understanding of the brand when they actively evaluate it. Other marketers may need to retool their loyalty programs by focusing on active rather than passive loyalists or to spend money on in-store activities or word-of-mouth programs. The increasing complexity of the consumer decision journey will force virtually all companies to adopt new ways of measuring consumer attitudes, brand performance, and the effectiveness of marketing expenditures across the whole process. Without such a realignment of spending, marketers* *face two risks. First, they could waste money: at a time when revenue growth is critical and funding tight, advertising and other investments will be less effective because consumers aren't getting the right information at the right time. Second, marketers could seem out of touch—for instance, by trying to push products on customers rather than providing them with the information, support, and experience they want to reach decisions themselves." (McKinsey, 2009)*

4. Semi-structured Interviews' Questions

1. O que o motiva a estar ativo na área da filantropia?
2. Qual o impacto que gostaria de ter na sociedade através da sua filantropia?
3. Em geral, o que o leva a considerar apoiar uma causa/instituição e não outra?
4. Qual o processo que utiliza para apoiar causas/instituições? Porquê? (Através de Fundação? Associação? Empresa? Faz diretamente?)
5. Do seu ponto de vista, como são usadas as doações recebidas pelas causas/ organizações?
6. Como vê a sua participação na filantropia em Portugal nos próximos 10 anos?
7. Deixaria alguma recomendação adicional de iniciativas que possam promover e dinamizar o ecossistema de filantropia em Portugal?

5. Conclusions synthesised

	Literature	**Interviews**			**Blockages in PT**	**Recommendations**
		A	**B**	**C**		
Trigger	own observation OR solicitation	mainly solicitations			disorganized, lack of articulation, low	training & compensation to collaborators,

					expertise, emergency only - irregular, reactive, disconnected	collaborative culture
Consider	high urgency, importance, deserving, feel responsible	relationship w/organization responsibility, ability, important, urgent, deserving,	relationship w/organization		how to evaluate importance and urgency? accountability and transparency, scattered information, few advisors	aggregation of information about funds and impact
Evaluate	business practices, recognition, overhead, privacy, financial disclosure. Empathy and personal connection. Hyperagency, advisors	control, knowledge, no intermediaries - hyperagency	personal connection, professionalism, impact			creation of advisory departments/ firms
Act	worthiness	hometowns, uniqueness of donation, trust	personal connecti on, professio nalism, impact	hometow ns, personall y knew, impact	assess impact? Create family strategy?	
Enjoy	observe impact, be invited	proud, no publicity	no publicity expected	pleasure when skills used, impact expected, emotiona l benefits		thanking, offer recognition, share information, engage

Bond	make donors feel empathy, joy of giving, community, celebrate, thanking, recognizing, meeting people, communication	close relation, empathy, local connector,	close relation, events, communication, community, recognition and gratitude are enough,	close relation, part of org, follow, events, decisions	capacity building, low focus of bonding	
Advocate	tell friends and family, valued opinions	did not, avoid making publicity			culture sees publicity as bad	show as a positive thing
Loyal	virtuous cycle, know org. makes a difference	follow evolution, open to be asked, don't have plan, very loyal	follow evolution, committed to vision, open to help if asked, may help other orgs.		follow evolution, connected, more reactive, want to keep helping, but might support others	
Archetypes	-	Altruist, change,	Altruist, change, friends, actualization,	Altruist, change, dynasty	-	-

Table 2: Conclusions synthesised